DOCUMENT RESUME

ED 271 916 EC 190 224

AUTHOR Cieloha, C. Danford
TITLE Special Education in the Context of National Development: The Case of Mexico.
PUB DATE Apr 86
NOTE 46p.; Paper presented at the Annual Meeting of the American Educational Research Association (67th, San Francisco, CA, April 16-20, 1986).
PUB TYPE Speeches/Conference Papers (150) -- Reports - Descriptive (141)

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Comparative Education; Compliance (Legal); *Cross Cultural Studies; *Developing Nations; *Disabilities; Elementary Secondary Education; Program Development; *Special Education; Trend Analysis
IDENTIFIERS *Mexico

ABSTRACT

The paper suggests that a general pattern of special education development exists and uses that historical perspective to create a context for comparison and understanding of the path of special education in the less economically developed country of Mexico. Drawing upon primary sources, it describes the evolutionary path of special education in Mexico and offers a rationale for the existence of any special education services within an environment of scarcity. The development pattern and country-specific data are then synthesized to create an example of commonality-based analysis of special education development. Such an analysis identifies weaknesses and strengths common to both the United States and Mexico, noting that problems in both countries' special education systems stem from the same lack of political will to fully implement existing universal special education legislation. A two-page bibliography concludes the document. (Author/CL)

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SPECIAL EDUCATION IN THE CONTEXT OF NATIONAL DEVELOPMENT:

THE CASE OF MEXICO

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April, 1986

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ABSTRACT

The paper suggests that a general pattern of special education development exists and uses that historical perspective to create a context for comparison and understanding of the path of special education in a less economically developed country, México. Drawing upon many primary sources, it describes and discusses the evolutionary path of special education in México and moves on to offer a rationale for the existence of any special education services within an environment of scarcity. The development pattern and country-specific data are then synthesized and used to create an example of commonality-based analysis of special education development.

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FOREWORD

In addition to creating a fuller understanding of this topic for myself I have had several other objectives in mind in writing this paper. First, I trust that the information this paper contains will be of use to people in the field. To my knowledge it is the first English language account of the structure, function, and statistics of public special education in México. Second, I hope that the analysis and alternative frameworks/methodologies will encourage researchers/evaluators to consider the incorporation of "commonality-based" investigations/program evaluations into their own research models and methodologies. Third, by acquainting others with the Mexican experience I am convinced that they too will become more sensitized to the universal quality of the need and the struggle for the right to an appropriate education for all children with disabilities. Finally, I would hope that an increased sensitivity will, in turn, move each of us to be stronger agitators for and facilitators of educational progress with the worldwide disabled community.

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INTRODUCTION

In less developed countries special education, education for children with disabilities or other special needs who require adaptive teaching techniques, equipment, and/or facilities in order to learn, differs in several significant ways from special education in more developed countries. These differences are most apparent in 1.) numbers of children served, 2.) quantities of resources allocated to special education, 3.) location of special education schools/ programs, and 4.) quality of services provided. What are the bases for these differences and why do they occur? This paper provides a synoptic review of the general historical development of special education to provide a precedent-based context from which to describe and discuss the evolution of special education in a less developed country, and analyze specific areas of difference and similarity to more developed systems and propose a commonality-based design for comparative studies that emphasizes possibilities for change through recognition of trans-systemic factors affecting service delivery.

Using the Mexican experience as a case in point we will explore the history and present status of publicly-funded special education (and, by implication, the larger educational enterprise) and its dynamic relationships to various macro structures in which it exists. We will also trace the etiology of a dilemma that is particularly apparent in a less developed country vis-a-vis children who require special education; namely, who is to be educated and why? If many children capable of benefiting from regular education are not participating fully (due in large part to public policy decisions which are reflected in a lack of implementation of existing laws and inadequate financial support) how can the expenditure of additional resources for the inclusion of disabled children who need even more than is offered in existing educational services be justified? While politics everywhere revolves around the allocation

of scarce resources, the structural trends and patterns reflected in special education policy offer a high-relief glimpse of the literal scarcity which characterizes life for so many of the nation's people and the concurrent resource allocation dilemma facing the Mexican government. We will explore the relationship of the special education "dilemma" to various structural elements of Mexican society and also consider it as a manifestation of larger patterns of structural inequity.

It is hoped that in the course of better understanding this one developing element of a larger macro system the parallel points, trends, and patterns of commonality between the part and the whole will also emerge. By identifying and examining the gap that exists in the availability of special education services (one of the many system-wide gaps that inevitably accompany processes of national development) we will also be able to more clearly see some points of micro and macro level contradiction that seem to be characteristic of development processes in market or mixed economies.

Finally, by examining the implications of the paper's conclusions for comparative or cross-system analysis of special education it will be suggested that we can 1.) encourage those in the field to identify and understand common and universal points of resistance to adequate services for disabled children, 2.) create a more positive climate for acceptance of a study/evaluation's findings, and 3). foster a greater sense of international solidarity for special education advocacy and program implementation through increased awareness of commonality of interest and experience.

Special Education in Historical Perspective

What follows is an abbreviated account of the evolution of special education as it has appeared in most developed countries and urban centers of the Western World. We are discussing special education historically out of the conviction that, at least in those less developed nations linked directly to the world market economy, their patterns of special education development tend to follow the patterns of those nations which are more developed (Cardosa & Faletto,1978). This general pattern of special education development also seems to be particularly characteristic of most Western European countries and those that have strong historical ties to Europe.

The history of special education as an entity separate from regular education begins in the early through mid-nineteenth century in urban centers of then "developing" countries including Great Britain, France, Scandanavia, and the United States. Over the years, the appearance of facilities to care and provide rudimentary education for disabled children in these urban centers can be attributed to such factors as: 1.) schools as institutions dedicated to the education of relatively large numbers of children being, by and large, an urban phenomenon; 2.) urban centers providing settings in which the wealthy (individuals, secular or religious organizations) could display their affluence through philanthropic endeavors; 3.) national governments displaying their increasing power, affluence, and understanding of the need for their people's support through the development of public buildings and monuments and limited public services in their capitals and/or other great urban areas; 4.) the involvement of churches and other institutions in charitable work which was usually focused on the urban poor and provided the preponderance of what health and social services then existed; and, 5.) towns and cities often providing the first opportunities for people with disabilities to be seen and see themselves

in sufficient numbers to perceive themselves as distinct groups and people who did not function within that environment in the same ways as non-disabled people.

Education specifically for disabled children usually appeared first in the form of self-contained schools for deaf and blind students. They were usually located in a city or country area nearby; very much in the tradition of the isolation characteristic of the asylum and poorhouse of earlier centuries (Foucault,1973). Frequently, they were begun as philanthropic endeavors of individuals, religious institutions, secular institutions, or were created, for example, as a government's "National School for the Blind" etc. A major impetus for the creation of such schools was the increasing number of surviving disabled children beginning to aggregate in urban areas coupled with the increasing sense of collective responsibility for the welfare of others which was characteristic of the social reform movement of the latter nineteenth century (Sloan, 1973). The movement and its values were in turn powered largely by the ability and desire to do something about the welfare of others that is often, in market economies, particularly characteristic of a sufficiently affluent people who remain primarily responsible for their own welfare but are no longer totally preoccupied by it.

By the last quarter of the nineteenth century self-contained national or regional schools for children with certain disabilities, again, principally blind or deaf, began to appear in capitals and major cities of many Latin American countries as well. That this phenomenon tended to occur first in the "Europeanized" centers of these countries, many of which were still bound up in their feudalistic economic and social relationships with more developed countries, would seem to indicate that similar interactive requirements for the

development of special education can be present in urban areas **regardless of a nation's overall level of development.**

However, we must also take into consideration that, even in the last century, most Latin American countries would have been ranked between the most and least developed countries of the world in terms of development. The colonization by and influence of European states had left its mark on all of Latin America as an area that fit neither the mold of the completely industrialized states nor states that could be characterized as backward. Iglesias, amongst others, has suggested that this historical confluence has resulted in a greater structural solidity which has, in turn, been based on a diversification within Latin American systems of production and the general development of industrial activities (Iglesias,1977). Even though this development and diversification has been uneven and reflective of their dependent economic relationships, sufficient capital remained in most of Latin America to maintain at least a small upper class and significant urban areas. Thus, the differences in the growth and scope of programs and institutions to provide social services in Latin America, in contrast to Northern Europe and the U.S., has been much more a matter of creating and sustaining them on a smaller scale rather than whether or not they existed at all. This dynamic of differential scale has also had, and continues to have, a direct effect upon the quantity and, to a lesser extent, the quality of regular and special education throughout the region.

In the early part of this century opportunities for education became more available to larger numbers of children thoroughout the more developed world. This meant a sizeable capital investment in educational facilities and an increasingly rationalized educational system. The general expansion of secular education was sometimes accompanied by expanded special education facilities

(self-contained, usually residential, schools) as well. It is this general, albeit gradual, expansion of services and movement toward universalization of opportunity, supported over time by strong and increasingly integrated economic and social structures, that seems to characterize and distinguish special education in its more developed phase.

For more developed nations and/or urban centers a new incentive for the expansion of special education becomes apparent. The appearance of government sponsored entitlement and public welfare programs in this century and the increasing movement toward universalization of social benefits after the Great Depression (and even more so after the Second World War) could make possible a new motivation and rationale for providing special education beyond traditional notions of charity or compassion. Potentially, a government could now become responsible for the maintenance of those disabled children who might be neither institutionalized nor capable of attending a regular school and subsequently finding employment. The possbility of this occurring might pre-date the notion of "human capital" as a theory (Schultz,1970), but the net effect of the existence of thousands of unemployed, disabled people would remain a potential long-term drain on government finances as well as a loss to overall economic productivity and growth.

Within secular special education's universalization phase differing paths have emerged. In Europe, with the exception of Ireland, it has remained on the path of regional/residential and local, self-contained schools. Among other things this may well reflect the centralist tradition in European (and Latin American) education whereby most educational decisions are made nationally or regionally (Veliz,1968). In contrast, the evolution of special education in the United States has grown to reflect the country's long tradition of decentralized education so that education of disabled children has become a

local responsibility under state and federal guidelines. This bifurcation in the evolutionary path of special education provides us with a particularly interesting point upon which to speculate concerning special education's future course in less developed countries. Will they follow either of these roads, or might we expect the development of alternative forms reflective of other traditions and ideologies?

At this point our discussion of the development of special education departs from the coverage of the dual development paths to focus on the American experience. In part this reflects my own bias toward writing about what I know best. However, it is in the United States that education for children with disabilities has clearly moved away from the separate school concept toward a more integrated idea of special education, and while special education in Mexico is not of the same quantity as in the United States, presently available services throughout the country tend to more closely follow the American model than the European one.

For the greater part of the century advances in the education of children with disabilities in the United States have been the result of recurring cycles of frustration and activism, followed by systemic changes or the development of parent/advocate - actualized alternatives to an unresponsive education system. To those in need, inadequate services or the total lack of special education was made more apparent by the general move toward more universal education. Usually, parents had to make a choice between their disabled child receiving a "public" education and keeping the child at home as part of the family. More parents became dissatisfied with the notion of sending their children to a national or regional special school which could be be hundreds of miles away.

By the middle of the twentieth century the need for disabled children to be served locally in the United States was increasingly recognized as indicated by

the building of self-contained schools that would allow children to remain with their families while receiving public education. This phenomenon tended to occur where there was a local tax base capable of supporting additional services since financing of public education at this time was solely a function of local school districts. Where local districts were unresponsive or incapable of providing special education services parents, on their own initiative or with the support of national disability charities, often began their own schools. When there were no qualified teachers they would share teaching responsibilities among themselves while locating and/or training others to do the work.

By the early 1960s a variety of factors marked the beginning of significant change in much of special education. These included: 1.) the virtual elimination of poliomyelitis and rapid advances in medical technology that dramatically increased the survival rate of "high - risk" infants and the resultant decrease in numbers of children of normal learning ability (post - polio) and increase in children with severe and multiple disabilities needing special education; 2.) the concomitant need for teachers with more specialized knowledge and skills to teach them; 3.) the resultant move toward greater professionalization (preparatory curricula, specialized degrees, credentials, professional associations) of special education teachers; 4.) continuing pressure from parents, advocacy groups, and the emerging profession for more universal and comprehensive services; and, 5.) advances in all areas of knowledge related to special education.

In the wake of the movements for Black civil rights and against the Viet Nam war the passage of Public Law 94-142 in 1975 marked both a culmination and a beginning in the struggle for civil rights of people with disabilities and, concomitantly, special education in the United States. The Act provided that in order for any state to receive federal funds for special education it must

establish procedures that assured, "to the maximum extent possible, all disabled children be educated with children who are not disabled and that special classes, separate schooling, or other removal of disabled children from the regular educational environment could only be considered if the disability was so severe that supplemental aids and services still could not allow the student to benefit sufficiently from learning in a regular classroom (Abeson, 1977). The law was a culmination of efforts by parents, advocates, and some educators and legislators to finally universalize, codify, and enrich the education of disabled students. It was also passed, in part, as a means of neutralizing the enormous pressures these groups had brought to bear on Congress.

As a beginning point it recognized the human and civil rights of all disabled children to "a free and appropriate education." Along with other disability-related legislation of the period, P.L. 94-142 signalled a marked shift in public policy - a recognition of the necessity of federal intervention to insure equal opportunity for disabled people as it had done some ten years earlier for black people as well as the larger intention of the nation to more fully integrate itself.

However, in the years following the law's passage, it has never been voted more than 40% of its full funding amount. Increasingly, the burden for funding what the Congress has mandated has fallen on the states and local districts. They, in turn, will not, or in some cases, cannot fully fund Public Law 94-142 themselves. Even though the law has brought about massive reforms in special education in the U.S., the country is still left with more strong rhetoric and the appearance of good intentions than a fully funded and implemented, universal system of special education. What appeared in 1975 to be political will may have been, in reality, much more closely related to political expediency.

Disability and Handicap from a Latin Perspective

In the context of this paper the word disability denotes the presence of an empirically testable condition of physical, emotional, or mental impairment. There seems to exist a universal, cross-cultural consensus on this point (Tablada,1984). However, handicap has a more relative meaning that is dependent on cultural, social, and behavioral norms and attitudes (Stolow & Clovers,1981). "Which variations will be considered disabilities, impairments, or handicaps is strictly relative to the expectations of the culture in which the person lives, the tasks that are required of him/her, and the meaning him/herself and others may assign to the variation" (Cruikshank,1971).

As is true in all cultures, there are limiting and facilitating cultural factors that are of particular relevance in beginning to understand both the advantages and disadvantages of handicaps as they are created and perpetuated for and by disabled individuals within Latin culture. Generally, in the Latin case perceptions range from the old, traditionalist view of a person's disability as God's judgement on that individual or family to, on the other hand, seemingly high degrees of acceptance and integration of disabled people into the community. The latter is often the result of a combination of people's attitudes and the existence of niches in the economies of less developed countries for untrained laborers. In commenting on this phenomenon, and referring specifically to Latin America, Aptekar (1983) states that "...by necessity the people's values and consequent attitudes have allowed for the exposure and involvement of the disabled person in public life." Therefore, as we consider the "hows" and "whys" of similarity and difference in Mexico's system of public special education it is important to include within our analysis the view as seen through a different cultural "lens."

Some Basic Facts Concerning México In the Last Decade

Along with many other countries in Latin America México continues to experience a profound economic crisis that effects every sector and class within the country. Pressures from the International Monetary Fund as well as foreign banks and governments to make payments on the country's foreign debt, which now approaches 100 billion dollars, have caused the national leadership to impose economic austerity measures ranging from reduced subsidies on tortillas to a forty percent reduction in imported pharmaceutical products to drastic reductions in a variety of government-funded programs and services (Santander, 1983). The crisis has deepened due to a significant drop in the price of crude oil on world markets. The depressed economic conditions in more developed countries in the early 1980's have also had profound consequences for Mexico and other less developed countries as well. Markets for exports have slowed or entirely disappeared while imported goods have become more costly or unavailable.

México has not been able to provide for even the most basic needs of many of its people. Between 1970 and 1980 the country's population increased at an average annual growth rate of 3.3%, reaching 70 million soon after the completion of the 1980 census (Consejo Nacionál de Población, 1981). Children under the age of 14 also came to comprise over 50% of the population during the decade (SALA,1981). Yet, health, education, and social services did not keep pace with these increases, despite the fact that the government and private firms were borrowing vast sums of money and petroleum production and sales were at all-time highs. It became clear that the preponderance of earned and borrowed dollars were to be allocated to capital expenditures for industrial expansion (with a generous portion retained by then President Lopez Portillo and other members of the government) rather than to programs that would allow education

and social services to keep pace with population growth. And even with industrial and business expansion during the period unemployment and underemployment remained endemic (25% and 65%, respectively) (de Tiburcio, 1984).

The following table depicting federal government tax revenues and various social indicators combine to provide us with a dramatic statistical picture of public policy decisions concerning human services during this time (SALA,1981) (SPP,1982).

Table 1 MEXICAN SOCIAL INDICATORS - 1977 & 1980

Year	Central Government Tax Revenues as % of GDP	% Total Central Government Expenditure on		
		Housing	Education	Health
1977	10.6	-	6.1	3.3
1980	17.2	.1	7.7	8.0

(Source: Statistical Abstract for Latin America, 1981.)

While not comprehensive, the table does still provide a sense of the scope of the underlying structural problems; especially when they are compared to other Latin American countries such as Colombia (22.4% expenditure for education-1980) or Bolivia (18.3% expenditure for health-1980). The amounts spent for human services have served to further widen the gaps in both the scope and delivery of all formal health, education, and social services in Mexico. For example, in 1976 only 35% of Mexico's then 62 million inhabitants were covered by the health services of the various social security institutions; leaving some 40 million to be served by the government's Salubridad Social which could provide services to little more than half that number (Lopez-Acuna, 1980).

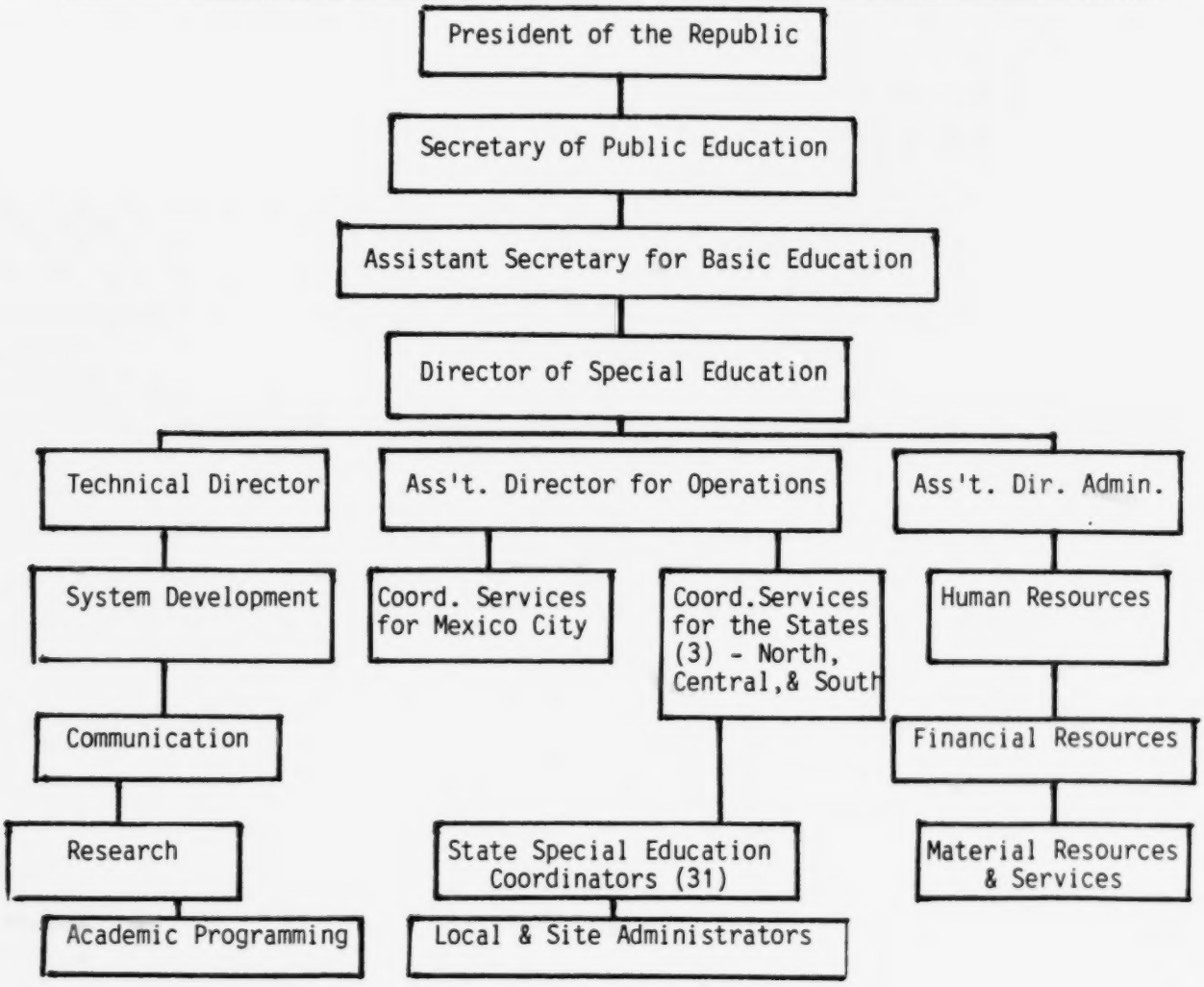
The gap in educational services has manifested itself in a somewhat

different manner. Federal and state expenditures for education between the years 1971 and 1976 increased by 14% and 2.5% respectively (above baseline period 1965-70) (Izquierdo & Rodriguez, 1977). Yet, by 1980 overall education spending amounted to only 7.7% of GDP (see Figure 1); and, among children 17 years and younger the percentage enrolled in schools of all types did not exceed 70% (CEPAL,1981). Of those who have matriculated it has not been uncommon, up to the present, to find classes at both the Primaria and Secondaria levels with student-teacher ratios of at least 50:1. Among lower class urban families and many rural families education beyond minimal literacy has often been deemed neither practical in economic terms (since there is a lack of employment opportunities even for those who complete school) nor desirable (since it is difficult to force disheartened children to remain in educational settings where teachers are often demoralized and facilities and supplies are frequently lacking or inadequate). This dynamic is confirmed by a recent report from the Secretaría de Educación Pública reporting that fully 48% of all third grade children enrolled for the 1982-83 school year did not return the following year (Excelsior,1984).

The Present Administrative Structure of Special Education in México

The ministry known as the Secretary of Public Education (Secretaría de Educación Pública or SEP) reflects the same kind of centralized administrative structure and unitary authority that are typical of most ministries and agencies at both the federal and state levels.

Table 2 - Organization Chart - Dirección General de Educación Especial



(Source: Dirección General de Educación Especial, 1980.)

Decisions are made and administrative policies, curriculum, and budget created at the center, Mexico City, and disseminated to the periphery, the various states and, in turn, localities. (Roughly ten percent of special education facilities are administered separately by the individual states, but even this is done under federal guidelines and supervision.) Though both México and the United States appear to have similar federal systems in which states have a certain degree of autonomy, the Mexican system is, in fact, much more centralized. Major domestic policy, innovations, and budgets generally come from the federal level through the President and Ministry offices rather than through initiatives at the state or local level.

The benefits and hazards of centralization are fairly well known (Benveniste,1983) and the country's special education system suffers and profits from most of them. More specifically, some of the benefits in this case, especially for administrators, include: 1.) greater control in all administrative areas by the top of lower levels of the organization which results in, for good or ill; 2.) programs at the local level more directly reflective of national policy because, in turn; 3.)local and state authorities being directly responsible to their superiors at each level of this unitized authority structure. However, this kind of cycle of control and responsibility also produces, in many instances, a less responsive system with special education services inappropriate to the particular population or, still worse, no program at all in other areas.

Special Education in Mexico - An Historical Perspective

To become acquainted with the development of education for disabled children in México we will utilize a general, chronological listing of events, persons, and dates in the history of Mexican special education superimposed upon related epochs and events in Mexican history; we will also be referring back to various points of commonality with some of the larger historical patterns and trends of special education discussed earlier. México has followed the same basic pattern moving from national schools for specific disabilities to programs and self-contained schools to, in some instances, programs in regular schools and other forms of "mainstreaming."

The first federal government initiative in the field was la Escuela Nacional de Sordos, the National School of the Deaf, founded at the direction of President Benito Juarez in 1867. In 1870 he also founded the National School of the Blind. In time and manner these initiatives were very similar to those in other nations of the Americas and northern Europe, following the same general pattern of development from the center toward the periphery. Prior to 1867 the care of surviving disabled children was primarily a responsibility of charitable institutions, most of which were related to the Catholic church (Larroyo,1983). (For the purposes of this paper, however, only the development of secular special education is being examined.)

To more clearly understand the level of aspirations held for special education by such an enlightened leader as Juarez and other luminaries of the Reforma such as Antonio Martinez de Castro, Minister of Justice and Public Education and educational positivist philosopher Gabino Barreda, the following is an excerpt from their Basic Education Law of 1867 which outlines the curriculum of the School for the Deaf. It was to include "...Spanish reading and writing, catechism and religious principles, world and Mexican history,

geography, natural history, arithmetic, and, especially such fundamentals as gardening and horticulture practice for children, manual work such as stitchery, embroidery and knitting, and book-keeping for those who showed a particular aptitude" (Larroyo,1983).

The next major initiative in the field came in 1914 with the founding of a school for mentally retarded children in León, Guanajuato in 1914 by Dr. José de Jesús Gonzalez. The period from 1919 to 1927 saw the development of the first teacher training programs for working with disabled children, training and educational research in the area of education for mentally retarded children at the Universidad Nacional Autónoma de México, and the founding of yet another school for mentally retarded children, this one in Guadalajara. While progress during this period was not at a pace precisely comparable to that of other nations, the fact that any advances were made is remarkable. For, this is the period immediately following the Mexican Civil War in which ten percent of the nation's population died and another ten percent fled the country (Hayes-Bautista,1984). However, a positive result of this national bloodletting had been the Constitution of 1917 in which Article 123 provides for universal social services and, by implication, a basis for the continuing movement toward expansion of such services as special education.

The first institutionalization of a portion of special education since Juarez's establishment of national schools for the blind and deaf came in 1935 when Dr. Roberto Solís Quiroga convinced the Ministry of Public Education of the necessity for the inclusion of services to mentally retarded children in the new Basic Law for Education (Ley Orgánica de Educación). This same man was instrumental in the Mexican Congress' 1941 passage of a modification to the law of 1935 that established the first teacher-training school specifically intended for the preparation of special education teachers other than those established

for teachers of blind and deaf students in the late nineteenth century.

These various developments mirrored many of the events and trends of nearly the same period in the United States. Major differences, however, still centered (as we have already seen would be the case for any less developed country of Latin America) upon the quantities of resources allocated, numbers of children served, and numbers of schools in operation. For, through this period Mexican special education was still institution-based and extremely limited in scope with available resources being channeled to only the six schools located in three major metropolitan areas. However, in 1935 the federal government did expand services somewhat with the founding of the first national clinic dealing with speech and behavior problems.

The limited progress in the area of diagnosis and education of disabled children was certainly not indicative of regressive thinking on the part of then-President Lazaro Cárdenas. It was, rather, a reflection of the overdrawn state of the government's account at the Bank of México (Johnson,1984). This, at least in part, was the result of his efforts to implement progressive policies within an economic milieu that still reflected the political and economic constraints and pressures of an internal oligarchical clique and, relatedly, those brought to bear on México as a country bound up in dependent economic relations with more developed countries. As is true of the present, the mid-to-late nineteen thirties were a particularly difficult period for the country. On the heels of the Great Depression, Cardenas initiated a massive agrarian reform and various nationalization measures including the nationalization of México's oil industry. The latter resulted in an economic boycott by the U.S.and much of Europe. It was remarkable that any government-led expansion of special education occurred at all on the heels of the Great Depression.

With the coming of the Second World War México began to experience its first period of extended economic growth since the Revolution. Under the regime of Manuel Ávila Camacho (1940-1946) public education for children with special needs began to grow as well. As an experimental program, two self-contained classes for disabled students were established in the demonstration school of Mexico City's teacher-training college (la Normál de Maestros). Several years later ten other such classes were instituted in various primary schools around the capital. In 1943 the first school for the training of special education teachers (Escuela de Formación Docente) was established as part of the Medical-Pedagogical Institute in Mexico City. The primary significance of this period lies not so much in what was being done in the field, for it basically parallels advances that were being made concurrently in more developed countries, but, again, the quantity of training and services; for even in a time of prosperity a great majority of disabled children received no special assistance.

The next growth spurt for public special education came in the 1960's. In 1959 the Minister for Public Education had created the Coordinating Office for Special Education. Greater interest then began to be shown as reflected by the broadening of special education's focus to include more than just mentally retarded children. In 1962 a school for children with learning disabilities was established in Córdoba, Veracruz. This was followed by the creation of twenty five more schools for students with a variety of disabilities, thirteen in Mexico City and twelve in major population centers from Mérida to Chihuahua and Colima to San Luis Potosí. These later material gains were consolidated politically with the creation in 1970 of a separate unit for special education (Dirección Generál de Educación Especiál) whose Director-General reported directly to the Assistant Secretary for Basic Education. The decree creating the Dirección Generál was especially significant as it signalled an increased

awareness and change in attitude on the part of the federal government concerning the education of children with special needs.

Because the Mexican system, as we have noted before, is a centralized one, the bureaucratic recognition opened an institutional path to more formally systematize and coordinate many of the previously fragmented and dispersed special education and special education teacher training efforts around the country. The change also "...signified an important milestone in México's socio-cultural evolution, to incorporate it into the group of nations who, in accordance with UNESCO's recommendations, recognize the necessity of special education within the broad context of general education" (Dirección General de Educación, 1981).

Between 1970 and 1976 the Office for Special Education initiated several innovative and progressive programs which may also be viewed as models for the future accessibility and diffusion of special education and related services. The first was a pilot project integrating a limited number of disabled children into regular education classrooms; these initial mainstreaming efforts occurred in Mexico City and Monterrey. The other was the development of a network of centers throughout the country, thirteen as of 1981, offering rehabilitation and special education services. The CREE's (Centros de Rehabilitación y Educación Especial) were a jointly sponsored project with the National System for the Integral Development of the Family, known by its Spanish-language acronym of DIF. The particular advantage of this cooperative venture was that DIF already had or was in the process of constructing and staffing centers throughout México, even in many towns of less than 50,000. In addition, most centers have itinerant workers in the surrounding countryside who, amongst other things, can inform people living in the small villages and the ranchos concerning the availability of special education and rehabilitation services (DIF, 1983).

A CREE offers services which include: 1.) psycho- educational diagnostic evaluations; 2.) classes for disabled children who cannot attend a regular education school or who live in an area where there are no appropriate special education classes available or are in need of medical treatment; 3.) support services for mainstreamed children and for those in self-contained special education classes; and, 4.) tutoring services for learning disabled children attending regular education classes. For the future, the use of CREEs can provide Mexican Special education with a low-capital-expenditure means of expanding services throughout the country.

The late 1970's was a period of administrative consolidation in Mexican special education. By 1974, administrative coordinators for special education had been designated in both the capital and a number of states. By 1979, all 31 states had coordinators and were now even more firmly linked to federal policies, guidelines, and budgets. This further centralization is significant at a number of levels. Budgetarily, it means that local schools receive their federal funds through and are accountable to a state office located in each state capital. Augmentations or other adjustments to local budgets must all be approved at the state level. For example, in the State of Guanajuato such changes are usually accomplished by the local site administrator appearing, in person, at the state coordinator's office. Likewise, in that state, local administrators, many of whom seem to combine the functions of school principal and school district superintendent in the U.S., are convened regularly in the state capital to discuss policies, procedures, etc. Overall, this particular bureaucratic design seems to have the effect of keeping top-down administrative controls tight while also assuring at least some level of both vertical and horizontal communication within the system.

The same period also marked further expansion in the quantities of services

provided. By the 1980-81 school year services had expanded to the levels listed in the following table.

Table 3 - Special Education Facilities & Populations 1980-81

Facility	Quantity	Students
Schools	360	24,435
Rehabilitation & Special Education Centers	13	2,091
Psycho-Educational Diagnostic Centers	57	10,601
Clinics	12	5,797
Work and Sheltered Industry Training Centers	15	1,511
Mainstreamed Groups	177	24,055
TOTAL	634	68,490

(Source:Dirección Generál de Educación Especiál,1982)

Two-thirds of the way through the Sexenio of José Lopez Portillo (1976-1982) there were ten times more self-contained special education schools than had existed just fifteen years earlier. Other areas reflect similarly substantial increases over earlier periods while other categories listed did not even exist in 1965. It is the latter years of this expansion that can especially be traced to a number of factors which include 1.) the coming into positions of power of administrators who by training, social conciousness, and political sophistication were able to push for additional and expanded programs and budgets, 2.) pressures by better educated and organized teachers in both regular and special education on the federal office of education for more

special education training and services, 3.) continuing advocacy by national parent and disability-related action groups, and, perhaps most importantly, 4.) the vast quantities of petroleum-earned and borrowed money that served to greatly increase the full range of government-sponsored services including special education.

By 1982, and up to the present time, the federal office of special education offered services and programs in these disability areas: 1.) mental retardation, 2.) hearing impairment, 3.) speech impairment, 4.) neurological impairment, 5.) visual impairment, 6.) behavior problems, 7.) learning disabilities and, 8.) multiple disabilities (Dirección de Educación Especial, 1981). As we might expect based on our earlier discussion of the commonality and overall direction of special education development in countries that are part of the world market economy, in México, especially in its major population centers, the quality of programs and services provided, teaching, therapies, assessment, facilities and equipment, is, generally, on a par with similar services and programs in the United States or other countries.

Not only are all the major disability areas addressed, but many of the most current waves in international special education theory and practice can be observed throughout the country. Consider the following points. 1.) It is not unusual for a special education school staff to include a social worker, physical therapist, psychometrician, or nurse, in addition to a teaching staff with specialist credentials in a variety of disability areas. 2.) Increasing emphasis is being placed on work training, particularly for teen-age students. 3.) Strict regulations have been adopted concerning early diagnosis and treatment of learning disabilities that are linked to student promotion to higher grades. 4.)Disabled children now attend regular education schools in many areas and are either sent out to a special education facility part of the

day or receive help from the equivalent of a resource specialist on the regular school site. 5.) Related services such as physical or occupational therapy are considered to be part of a child's overall education plan. 6.) All services are at no cost to the child's family.

One cannot assume, however, that in México, anymore than in England or other more developed countries, that all programs, services, and facilities are of equal quality. Peripheral areas and marginal populations in most countries tend to receive the lesser quality in all of these categories, especially when the service delivery system is centralized. For example, in Mérida, the capital of the state of Yucatán, special education facilities for learning disabled children, who are brought daily from regular education schools around the city, takes place in small groups housed in freshly-painted, well-lighted, individual classrooms. By contrast, in the town of San Miguel de Allende, Guanajuato, the same kind of partial-day, learning disability program is housed in several large, poorly-lit rooms of the public library, along with the thirty students of a full-day program for mentally retarded children. As much as the relative coincidence of the overall development of special education, the quality of program, services, and facilities can be considered a point in common between both more and less developed countries. However, the greatest point of disparity remains the quantity of special education available in less developed countries.

For the school year 1981-82 the Dirección de Educación Especial counted a total served population of 112,026 with an estimate of 137,956 for the school year 1982-83 (SEP,1982). The breakdown of the 112,026 population figure is as follows (1976-77 statistics have been included for contrast):

Table 4 - Comparative Breakdown of Special Education Population by Disability

Disability Area	1976-77	1981-82
Mental Retardation	7,919	23,736
Visual Disorders	474	958
Hearing & Speech Disorders	2,003	6,896
Motor Impairment	530	1,031
Learning & Speech Problems	9,513	71,103
Behavior problems	3,095	8,230

(Source: SEP:La educación especial en cifras 1976 - 1982)

Before commenting on the significance of these figures it is perhaps best to place them in a larger statistical context, first, the special education budget over five years and, second, the estimate by the Dirección de Educación Especial of the overall disabled population in México between the ages of 0 and 14 as of 1982.

Table 5 - Comparative Annual Budget & % Increase for Special Education

	1978	1979	1980	1981	1982
Budget*	108,603	159,336	290,638	407,594	852,890
Increase	-	46.7	82.4	61.9	56.0
Students	29,133	36,482	48,690	66,158	109,037

*Figures are in millions of pesos, unadjusted for devaluation.

(Source:SEP,1982.)

Table 6-Total Estimated Population 14 Years & Under Needing Special Education

Disability Area	Estimate of Children in Need of Special Education as of 1982
Mental Retardation	835,162
Blind & Visually Impaired	32,121
Deaf & Hearing Impaired	192,729
Motor Impaired	160,608
Speech Problems	963,648
Learning Problems	803,040
Behavior Problems	481,828
TOTAL	3,469,132

(Source: SEP:la educación especial en cifras 1976 - 1982)

Collectively, these tables represent the fabric of special education and disability amongst the children of México today. Metaphorically, the woof consists of the strands of not insubstantial accomplishment and improvements in special education (Tables 4 & 5); but the warp, the structure in between which this delicately constituted effort is being woven (Table 6) is one of overwhelming need and seeming hopelessness. Based on the figures, which are government-produced and somewhat conservative in their estimate of total numbers of disabled children of school age, there are still no more than 3.8% being served.

Without the broad expansion of the more cost-efficient learning disabilities program in the mid-nineteen seventies the statistical picture would appear even bleaker. 63.5% of all special education students in 1982 came under this category as compared to 48.6% only one year earlier. Logically, given the very limited resources allocated, programs like that for learning disabilities which reach more children at a lower cost are allocated the largest budget; and

the learning and speech-related disability categories also happen to be representative of the largest identified disabled school-age population as well. (See Table 6.) By contrast, less cost-efficient programs constitute much smaller percentages; for example, students in the mentally retarded program comprise 21.2% of total 1982 special education enrollees and motor impaired children constitute only .009%. Even within such categories as learning and speech disabilities, only 6% of the children in the country estimated to have these kinds of problems are enrolled in special programs.

At this point we end our chronological look at special education in Mexico. Complete statistics are not yet available to examine the most recent trends. However, it can can be surmised, based on such general facts as the economically depressed condition of the nation as well as specific information concerning special education freezes and cutbacks related in anecdotal data elicited from special education personnel in various parts of the country that there is little forward movement in the field over the past two years. Only dramatic turnabouts in the country's economic situation and/or political system seem capable of bringing substantive progress in the field of special education.

Special Education in the Context of Development: The Case of México - Some Analyses and Conclusions.

Why Special Education at All? - In other parts of this paper we have discussed a variety of economic development and social/culture-related factors that contribute to the present condition of special education in México including 1.) the onerous external debt, 2.) the world slump in petroleum prices, 3.) the insufficient resources allocated to social services including regular and special education, 4.) the lack of participation in education especially amongst marginalized people, and 5.) traditional attitudes toward disability that have resulted in a combination of a kind of acceptance and assigned role for disabled people within society and a corresponding lack of impetus for the special education of disabled children that might move them beyond their traditonal roles. Given these kinds of conditions why should special education exist at all?

Regular education in México is in crisis; there are too many children (32,000,000), too few teachers, and, most of all, too few resources committed to the educational enterprise. Marginalized people are expressing their opinion of what the education system offers them with their feet, as demonstrated by the fact that 48% of all students, the vast majority being from poor families, leave school by fourth grade. Why seek out marginal populations such as disabled children for educational opportunity when the cost per student and specially-trained teacher is so much higher than for regular education?

As earlier statistics pointed out, there are large gaps in the delivery systems for all social services in the country; millions go unserved. Unlike more developed countries, disabled people in México have no practical guarantee of either services or financial support from the government; begging and selling lottery tickets are popular alternative forms of self help. Since the government is not actually taking life-long responsibility for their welfare,

why should it spend scarce resources to benefit disabled children, people with seemingly less intrinsic possibility of contributing economically to society?

Some Answers - Consideration of a variety of factors, from the seemingly benevolent to the malevolent, can lead us toward an answer to these questions, a vantage point from which to better understand the phenomenon of special education in México. The factors I identify range from those related to the general cultural, political, economic and social environments in which Mexican special education exists to the more specific, actions-related reasons for its existence.

1.) It would be remiss to not acknowledge the significance of charity as a value within Mexican society. It is a fundamental doctrine of the Catholic Church and is, therefore, of at least some importance to the great majority of Mexicans. Also, as we have seen, the Church was the strongest force for care of disabled people prior to government's entry into the field in the middle of the last century (Larroyo,1983). The concept of charity figures as an element in the development and sustenance of values that are inclusive, at least at some level, of the disabled in Mexican society. These values, in turn, make disabled children's education a seemingly more logical part of a larger, common reality that can be considered as integral to a moral, religiously correct life.

2.) As we have seen, there exists a strong, liberal tradition of free and universal education, including education for the disabled, that stretches from Juarez and the Education Law of 1867 to the most recent special education legislation in the late 1970s. For some of the present generation this tradition is an accurate reflection of their personal political philosophies. For others, adherence to the universalist ideal reflects nothing more than the

PRI's (Partido Revolucionario Institutcional, México's dominant political party) need to retain rhetorical consonance with the ideology of the Mexican Reformist tradition. But, whether one has founding fathers in one's heart or just looking over a shoulder, the link between the present and the great reformers of the past remains a significant part of the rational and/or obligation for educating disabled children.

3.) Martin Carnoy has suggested that one of the principal functions of universal education in less developed countries, and, I would add, special education, is to substitute schooling for political rights and increased material consumption. By increasing schooling, present injustices such as lacks of political voice, economic mobility, or medical and social services are mediated in that the poor are induced to consume hope for the future - hope that their children, having attended school, will have a better future (Carnoy,1982). In the case of special education a better future would certainly include the fact that the educated disabled child might be more likely to be economically self-sufficient and not a continuing drain on his/her parents' resources. But beyond the level of hope for individual betterment, governments can expect the development of such a mentality to become pervasive amongst the majority of the population, buying for itself increased legitimacy and a part of the inextricable mix of economic and political time it so badly needs.

4.) Because México sees itself as part of the hemispheric and international community, the availability of special education becomes an important dimension of both self and international perception. Those countries viewed as being progressive have education programs for disabled children; therefore, México has one. As was pointed out in the description of Mexico's consolidation of special education services in 1970, a major impetus for the move was to come into compliance with UNESCO recommendations concerning the

"necessity of special education within the broad context of general education." Each international organization has its own special education interest area; and these, in turn, note what various countries are doing in the field. International conferences are held; progress is shared, perceptions and opinions are formed and reformed. For less developed countries these perceptions and opinions take on added importance as the evaluation teams from such international aid or lending agencies as the IMF and the World Bank come around developing profiles for evaluating a prospective borrowing or, as is more likely at present, debt-rescheduling nation.

5.) Special education exists in México for the same reason it exists throughout the rest of Latin America, North America, and Europe; people, as individuals and advocacy groups, have struggled for its existence and expansion. Through the efforts of self-help groups in the area such as El Cuerpo de Paz, the Special Olympics and support groups including Technología Apropriada Internacionál, la Organización Panamericana de la Salud, the World Rehabilitation Fund, and others, the existence and needs of disabled children are kept in the conciousness of the general population. Over the past few years a privately funded group in México has even sponsored, amongst other things, frequent television commercials about disabilities, available services, and what non-disabled people can do to help.

After examining various reasons for the continuing existence of special education in México, we move on to discuss what some forms and levels of analysis can accomplish and their degrees of effectiveness in gaining a more thorough understanding of special education in the context of processes of national development.

Internal Comparisons

If the ultimate goal of our summary analysis was to a develop a basic understanding of how and why special education remains so limited in both scope and impact comparisons at an internal level would permit us to see what services are how important to whom. We would use the national, state, and local special education documentation, information and statistics, developed earlier in this paper to provide a basis for comparison to other types and quantities of government expenditures in a larger context of national development spending priorities. For example, in 1982 the Mexican government spent the equivalent of approximately $3,472,000 dollars on special education, or $31 dollars per child per year (SEP,1982). If funding was all that was necessary, all children requiring special education in 1982 could have received it at a total cost of some 107,632,000 dollars. The cost of full special education funding would have been the equivalent of less than one-fourth of the 477,000,000 dollars that the government spent on the national railroads in 1979 (SPP,1982) or less than half of the interest paid on the country's external debt for one month of 1982, approximately $230,000,000 dollars (SPP,1984). Yet, to limit our focus to the level of internal comparative analysis would offer only the perspective from within - a helpful viewpoint but one that does not necessarily lead toward a larger, more universal understanding of the challenges facing special education as nations develop and change.

Cross-system Comparisons

At this point we turn to a discussion of the relative appropriateness and utility of analyzing specific areas of difference and similarity **between** systems of special education in less developed and more developed countries. In trying to broaden our perspective and develop greater comprehension it is tempting to utilize the earlier-described United States "special education of scale" paradigm as a basis for structural and directional comparisons between systems, setting up the highly-evolved, rationalized, and universal U.S.system to be contrasted with the less-evolved, less rationalized, and severely limited Mexican system.

As we have seen, there are bases for doing so; one can make comparisons utilizing such criteria as relative per capita expenditures or the degree of universality of special education opportunity and demonstrate the superiority of the U.S. system. It might even be concluded that, over time, the Mexican system seems to be taking on more of the characteristics of U.S. special education. However, to focus on a "what's different, what's the same?" methodology can leave us at the analytical dead-end that often occurs when examining development-related issues; the country that starts down the development path first is usually more successful first. ¿**Entonces?**... (And so?...) Such a dichotomous perspective can become an exercise in documenting foregone conclusions. More importantly, the glare of the obvious can also obscure underlying commonalities, both negative and positive.

Toward a Commonality-based Model for Comparative Special Education Policy Analysis

As we have progressed through our discussion of various levels and kinds of analysis useful to understanding and comparing special education in the context of processes of national development, I have purposely set them up and then tipped them slightly askew, as if they were analytical straw men. This is not to depricate their utility or effectiveness as evaluative tools but rather to emphasize the value of designing studies to include a commonality-based component. When we shift to a comparative form of analysis that looks for trends, problems, and themes common to both systems we can begin to develop a more universal framework within which to collect, categorize, analyze, and, most importantly, understand data. As we shall see later, this has implications not only for the researcher but those who must be able to understand, identify with and internalize study findings to effect corresponding change.

An overall design or component that emphasizes commonality is particularly important to actual program evaluation where study results are intended to be useful to people, especially those people, those stakeholders, who are involved in creating and maintaining special education or other such systems and services. A commonality-based study is predicated upon the inclusion of broadly-based communication and subsequent understandings that are founded in commonalities and the mutual experience and interests of both those studying and those being studied. Its primary objective is to produce a study that is most likely to initiate and facilitate actual change because it can proceed with minimal stakeholder and/or researcher resistance.

Watzlawick, et al, view communication between organization members and researchers as occurring similtaneously at two levels: the content and relational levels (Watzlawick, Beavin, & Jackson,1967). For them, content involves the particular information that is being communicated in the course of

a research study while the **relational** speaks to how particular content is to be, and is, interpreted among all participants in the "communication network." This model views the relational level as being relatively tacit and involving more subtle contextual cues that qualify or comment on the meaning of communication content. Finally, they stipulate that the researchers must explicitly address relational issues in order to establish a legitimate and independent identity outside of the various pre-existing points of view.

The use of commonality-based evaluation techniques are intended to impact equally on both facets of communication. By including the potential for developing points of commonality between systems, ideally, all aspects of research design and implementation can be based on mutually comprehensible concepts that assure a higher degree of consonance at both content and relational levels of communication and understanding among researchers and organization members.

Implications of Commonality-based Evaluation/Analysis for Comparative Special Education Studies

Undoubtedly, variations exist within particular research situations, especially when the study transcends national borders. Variations and differences related to culture, social values, economics, politics, gender, race, and/or education can and do impact upon all those involved in a study. A commonality-based research design can lessen that impact by heightening awareness of potential points of misunderstanding and offering avenues for mediation and remediation on the parts of all concerned.

Given the differences in starting points of the development process in various countries that results in some countries being more "advanced" than others, investigative/evaluative formats offering conclusions focusing on what one special education system lacks that another has serves to widen gaps of

understanding between the investigators and the investigated. This is of particular concern if an objective of the study is to offer recommendations for concrete change in the system being studied.

Typically, a U.S. researcher goes to México to collect data, analyze it, and make recommendations for change in the Mexican system. This frequently results in an organization reluctant and resistant to implementing the changes recommended. By calling for the incorporation of points of common weakness and strength between special education in its more and less "advanced" stages in any such study a number of things can be accomplished. 1.) A more positive atmosphere for understanding and acceptance of study findings can be created and maintained. 2.) Those in the field of special education can be encouraged to identify and better understand universal points of resistance to adequate services for disabled children. 3.) We can foster a greater sense of global solidarity for special education advocacy and program implementation through increased awareness of commonality of interest and experience.

Commonality-based Comparisons - An Example

When we shift to a comparative form of analysis that looks for trends, problems, and themes common to both systems we can begin to develop a more universal framework within which to collect, categorize, analyze, and, most importantly, understand data. As we shall see later, this has implications not only for the researcher but those who must be able to understand, identify with and internalize study findings to effect corresponding change.

What if, instead of leaving a comparative study at the equivalent of a monthly debit/credit financial summary report, we were to use the information to move ahead to ask "Why?" What if, for example, we were to proceed to examine the two systems of special education by identifying and analyzing problems in

common rather than viewing less economically developed countries' education efforts as inferior creations of the less sophisticated children of an upscale international family? Is there such a basis for commonality comparison in this instance? I believe that there is. Even though the Mexican system's immediate problem is more related to quantity of education while the U.S.'s is one of quality, both originate in the same lack of political will to allocate sufficient funds to implement fully the universal special education laws that exist in both countries.

Both Americans and Mexicans live, increasingly, in cultures of symbolism and gesture, where the bits and pieces of political word and deed are transubstantiated into acts of charity, goodwill, or even seeming good sense by a variety of media such as the tabloid's seven-page "color spread" with sentence-long captions or sophisticated images moving across 24-inch television screens with the over-voice of Peter Jennings or Jacobo Zabludovsky. This form-over-substance approach to social problems and policy also impacts upon the lives of disabled children, their families, and the educational enterprise devised to teach them.

After receiving flowers from a little girl in braces and crutches during a visit to a local school for disabled children, either Nancy Reagan or Paloma Cordero de la Madrid undoubtedly feel that they have been involved with and are working for disabled children In turn, the millions of people who see these benevolent acts of their leaders can also vicariously feel they are assisting those less fortunate than themselves. Most of us become only too willing to accept form over substance, especially when the form allows us to spend less and feel better. This is no more clearly visible than in the existence, in both countries, of nobly phrased special education laws that have never been fully implemented in either country.

In both countries the universal special education laws were drafted at the behest of interests ranging from parents of disabled children to bureaucrats to politicians to professionals in the field, each for their own diverse motives. For most Americans and Mexicans who are aware of them, such laws have put at a distance feelings of anxiety concerning the plight of disabled children. The "something" that should be done about "those children' has been done. There now exists not only the traditional sense of indifference about special education, but it is now coupled with the notion that since the laws exist, the educational future of disabled children certainly need not be a particular matter of personal or collective concern and responsibility.

What can be useful in coming to identify such an irony as part of our understanding of the problem? First, we are able to recognize that in identifying a lack of political resolve in both countries to implement their respective special education laws fully we have encountered a trans-systemic issue for special education and development, one that transcends the labels of less developed and more developed. Second, such a commonality-based perspective encourages us to shift from either a "top-down" or "bottom-up" view of the phenomenon (Nader,1972) to one that, in fact, "levels" our perceptions and facilitates a clearer, more horizontal and cross-systemic comprehension of common underlying causes of this particular instance of educational scarcity. Third, while such an insight does not provide us with a complete explanation, it does serve to enrich and universalize our understanding of the nature of the blocks that impede educational opportunity for disabled children. Finally, it also provides another correcting lense for our own creeping ethnocentrisms and a means for more empathetically and constructively viewing the increasingly intertwined destinies of two developing countries, México and the United States.

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